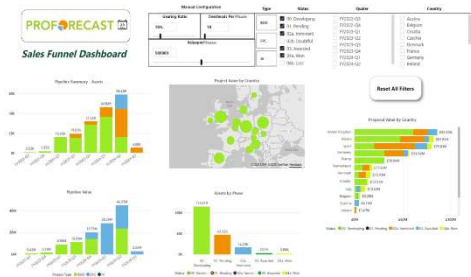
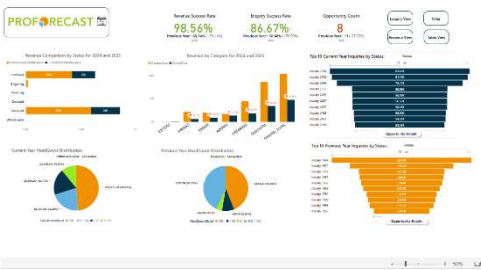


Case Study

Brokerage
Business



Introduction

- The client is a UK-based financial services company specializing in General Insurance Plans.
- Established for over a decade, they underwrite across multiple non-life risk categories and serve leading financial and retail institutions.
- As part of a larger group, their mission is to drive operational excellence as a lever for performance differentiation.
- Their product philosophy centres on simplicity, quality, and service.

Pain Points

- Fragmented business structure with six separate accounting ledgers created inefficiencies in financial management.
- Complex financial architecture across multiple entities hindered consolidation and reporting.
- The Finance Director was tasked with future-proofing financial operations for scalability and robustness.
- Payroll data import raised privacy concerns— anonymization was insufficient to prevent inference of individual salaries.
- Revenue modelling was complicated by:
 - A mix of in-force and new customers.
 - Variable monthly and annual premiums across product types.
 - A broker-agency business model requiring dual-role accounting logic.
- Commission flows—both paid and received—added further complexity to financial tracking.

Problems to be Solved

- Accounting needed to reflect both agency and principal roles depending on underwriting status.
- Commission structures required flexible modelling logic.
- Consolidation across multiple ledgers and ERP systems had to be streamlined.
- Payroll privacy had to be preserved without compromising data integrity.

Benefits Realized

- ProForecast’s business process templates simplified dual-role accounting and commission tracking.
- Consolidation tools and data connectors reduced month-end closing time by two days.
- Staff workload was reduced, freeing resources for strategic tasks.
- Reporting quality and system scalability were significantly enhanced.

Case Study

Brokerage Business



ProForecast offers Mid-market Businesses' flexible, cost effective and comprehensive forecasting and strategic planning capability incorporating AI and Machine Learning.

ProForecast fully integrates into the core accounting system, providing businesses with a powerful and transformational tool to enable management to make informed decisions quickly and accurately.

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Quality Of Support

- Support rated 9/10 by the client for responsiveness and effectiveness.
- Setup took longer than expected due to data volume and the need for a custom model.
- ProForecast's FP&A consultants worked closely with the finance team to meet tight deadlines.

Application Strengths

- Business process templates eliminated the need for multiple spreadsheets.
- Fast, responsive system with robust reporting and dashboard capabilities.
- "What If" scenario modelling greatly improved strategic planning and month-end reporting.

Application Dislikes

- Interface has many options, which can be overwhelming—though not all are required.
- Changes don't instantly update outputs like Excel; recalculation is required but ensures data integrity.
- Users acknowledged that this trade-off eliminated common Excel issues like version control and formula errors.

Desired Features

No additional features requested; client is satisfied with the current development roadmap.

Conclusion

- The client is pleased with their decision to adopt ProForecast.
- The platform is now embedded in their management system, improving operational resilience and strategic agility.
- The client has rolled out the system into a number of UK and overseas subsidiaries.